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Montana State Fund Guardian

Market Development Underway

August 1997

Mark Karvelis accepted the position of Market Development Manager and began work on July 28. Mark is responsible for the further development and administration of our agency partnership. In this role, Mark will handle the analysis of agency results and help foster positive relationships with producers. He will also assist in the development of new products and pricing strategies, oversee the activities of the Field Underwriter, and maintain current competitor information.

Mark joins us from American States Insurance Company in Helena where he served as Field Sales Manager since June 1996. Prior to that assignment, Mark was a commercial lines underwriter for American States in Seattle, and he has worked in the insurance industry since 1983. In 1995, he earned his CPCU (Chartered Property and Casualty Underwriter) designation.

According to Michael Glass, Underwriting Vice President, "Mark has developed solid working relationships with the Montana agency community. I am confident his good work will benefit the State Fund and its customers."

Mark, Mike Glass, and Carl Swanson recently visited agents in Great Falls, Helena, and Missoula. Following those visits, Mark said, "The agents are very excited about having the State Fund for a market." Carl was a featured speaker at the recent Independent Insurance Agents of Montana (IIAM) annual convention held in Kalispell. According to Roger McGlenn, IIAM Executive Director, "Agents are encouraged by the changes taking place at the State Fund."

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Customer Comments

Phyllis Nierenberg, CPA for a Shelby policyholder, told Mitzi Saltzman of the CSU that she has received great service and "we deserve a lot of at-a-boys."

"I would like to express my thanks to **David Garnice** for all of his sincere help."—June closed claim survey

"I was surprised to encounter such politeness. **Rae Jerrel's** kindness is commendable"—June closed claim survey

"I am pleased with the overall quality of the service. Thank you for your help; it is a comfort to know we are covered in such a comprehensive way."—June closed claim survey

Safety Day

Safety Day at the Capitol is scheduled for September 4. There will be many interesting exhibits and activities sponsored by various state and local government agencies, as well as the Wyoming/Montana Safety Council. An hour of paid work time between 10am and 3pm will be provided to allow everyone a chance to participate. Just schedule a time with your supervisor.

Published monthly by and for the employees of the Montana State Fund.

A Reason to Celebrate:
CSU Turns Two

State Fund employees celebrate the CSU's second anniversary.

August 14 marked the second year since the creation of the Customer Service Unit (CSU). In those two years, the CSU has seen many accomplishments and greatly improved service to State Fund customers.

In December 1997, the First Reporting Unit merged with the Customer Service Unit to further enhance service. Other important accomplishments include improved customer satisfaction from 80% in FY95 to 97% in FY97, promotion of a Senior Customer Service Representative to a Team Leader, and the recent elimination of the 5-line

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Mark K. adds, "From the agents already appointed, we have booked over $1,000,000 in new business and have an additional $1,000,000 in pending quotes. Agents not appointed are eagerly waiting for the completion of our Pilot Program. We intend to keep potential agents fully informed of the Pilot's progress and the timing of additional appointments."

Get Comfortable In Your Work Environment

The buzzword is ergonomics, and State Fund will hold **required** training sessions for all employees in September. Learn about body positioning, work space arrangement, and injury prevention. Sign up with Debbie Allen in HR for one of the sessions listed below.

Employee Sessions—
Monday, September 15, 3-4pm; Thursday, September 18, 9-10am;
Monday, September 22, 10-11am and 2-3pm

Supervisor/Manager Sessions—
Monday, September 15, 1:30-3pm; Monday, September 22, 8:30-10am

Kudos Kolumn

Kudos to Kim Erickson

Policyholder Bill Winterburn sent a fax thanking Kim for all of her help and stated, "It is always a pleasure to talk with you."

Kudos to the BB Unit

While several of its members were on vacation, everyone else pitched in to help out with the caseloads of those who were away. I want to thank everyone in the BB Unit for their hard work, enthusiastic teamwork, and cheerful cooperation.
—Mary Martinez

"Thanks to **Steve Scholl** in the BC Unit for his help with the Jacob Lowry fatality claim. Steve was acquainted with the family and helped drop off forms and gave the family my name and phone number at State Fund. I greatly appreciated his help."—Patrick Brown, AC Unit

"**Sarah Bennett** has come up with the Bennett Benefit. She plans to write her claimants a birthday card on their birthday with a few words of encouragement. I thought this was admirable and thoughtful of her."
—Todd Jones

Kudos to the CSU

For making the first reporting process easy for customers. Joe Copenhaver, Safety Manager for Livingston Rebuild Center, commented on how he really liked calling in First Reports.

Kudos to Valerie Bender

Policy Services received a note from a policyholder who wrote, "It was a real pleasure talking with Valerie. It's nice to deal with someone who is so kind and considerate."—Jay Phillips

Baby Block

Congratulations to Aidan Myhre and Mike Frank. They are the proud parents of a baby boy, Andrew Calahan, born on August 6.

Bernard Hewitt (Underwriting) also welcomes a boy to his family. Gavin was born on August 18.

Plan to attend the State Fund summer picnic on August 30. It will be held at No Wake Lake with festivities beginning at 1pm and lasting until 9pm; food will be served around 5pm. Bring your family and relax for all or part of the day.

The Special Activities Committee will provide pop; if you prefer another beverage, please bring it with you. Events and prizes are planned for kids, as well as swimming, skiing, horseshoes, and volleyball.

Please remember to bring lifejackets, lawn chairs, blankets, towels, and sunscreen.

Cost: $3/person, $5/family, $7/ per non-family members. Sign-up sheets are in the break room and with your department SAC rep . If you have questions or suggestions, talk to one of the Special Activities Committee members (Kelly Stanley, Kim Burbridge, Keri Routzahn, Vi Walchuk, Kelli Hargreaves, Helen Osterloth, and Kathy Rowsey).

New Peer Review Committee Members

The Peer Review Committee (Employee of the Month) has a new representative from each department. This important committee provides for additional, formal recognition of State Fund employees.

New Members:

Linda Harmon (Policy Services)
Wendy Lee (Admin/Finance)
Debra Brebner (Legal)
Stacy Ripple (MIS)
Carol Dullum (Claim)

Employee of the Month

Joyce Flynn's coworkers say she has done an excellent job over the last year dealing with all of the changes occurring in the Claim Department. She takes on more work than is required when her unit is shorthanded and also helps the claim assistants in other units. Joyce has taken the time to handle the changes with BIS and the Field Adjuster.

According to her coworkers, "Joyce's positive attitude reflects on her work and inspires others to strive to do the best job and attain the best results."

Congratulations, Joyce. You're an asset to the State Fund!

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phone system so all calls are answered by a Customer Service Representative.

The CSU realizes everyone helps contribute to their success. The Customer Service Representatives send a big thank you to all State Fund departments and employees who help them provide better customer service by keeping them informed of employee meetings, vacations, and other department events or developments. They are thankful for the training provided by other departments which keeps them better informed and able to take care of more customer's needs without transferring the call.

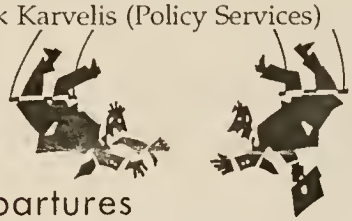
Nance Hughes, Customer Service Supervisor says, "Thanks so much for keeping us in the communication loop. It definitely helps with the quality of service we are able to provide State Fund customers."

Human Resources

Personnel changes as of August 15, 1997

New Hires

Mary Heare (Claim)
Judi Whitney (Claim)
Mark Karvelis (Policy Services)



Departures

Patty Murray (Claim)
Holly Kuder (Loss Control)

Celebrate work by playing all day!
Monday, September 1 is Labor Day—have a great day off!

Profiles

BA Unit

Front row, left to right: Kathy Hall, Lorna Smith, Lila McAlpin, Donna Gregg. Back row, left to right: Cris McCoy, Gina Huot, Shannon Olson, Jim Hultin, Barbara Holshue, Tom Fritch. Not pictured: Tammy Walczak

Lila McAlpin, Senior Claim Adjuster, has been with the State Fund nearly ten years. She has two children, Annie, 16 and Casey, 12 and enjoys new adventures, watching baseball, reading and traveling. Lila started selling Mary Kay cosmetics in March and she says, "I plan to be driving that pink Cadillac soon!"

Shannon Olson has been a Claim Adjuster for five months. Before she came to the State Fund, Shannon was a sales manager for the Colonial Hotel. She earned a degree in Exercise Science from Montana State University and enjoys running and working with her horse in her spare time.

Tammy Walczak, Claim Adjuster, has been with the State Fund for four months. She has a business degree from Montana State University and HIAA certification in group health and life insurance. Tammy is from Helena and has two children, Patrick, age 10 and Meghan, age 5.

Kathy Hall has been a Med Only Claims Adjuster for five years. She processes all medical bills and new claims. Prior to moving to the Claim Department, Kathy worked in Underwriting. She is from Clyde Park, Montana and has three children and one grandson.

Lorna Smith, Claim Assistant, helps the Claim Adjusters with their workload. She came to the State Fund in 1994 from the State Auditor's office. Lorna is a Certified Legal Secretary and enjoys ceramics in her spare time.

As a Claim Assistant, **Barbara Holshue** helps adjusters with clerical duties and paying bills. She has held previous clerical positions with the State and in the private sector. Barbara says she is "mom to two world travelers and just pays their phone bills."

Donna Gregg has been a Claim Adjuster since 1993. She has also been a Med Only Adjuster, Claim Assistant, and word processor; she earned her AIC in 1996. Donna has four children.

Jim Hultin, Claim Adjuster, coordinates all aspects of filed claims. He has a degree in genetics and pre-veterinarian. Jim is married with three daughters.

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Charlie Adams Monica Carson
Jay Phillips

Please call 444-6502 with comments or suggested articles.

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Training Calendar

Meetings for Results: This program will help you diagnose problems with meetings, produce results with meetings, and find creative alternatives to boring meetings. **Sept. 9-10**

Employee Assistance Program (EAP) Orientation for Employees: Review the referral and counseling services of one of your most valuable benefits. **Sept. 16**

EAP Training for Supervisors: Required training for supervisors. **Sept. 16**

Charting Your Career: Designed to help identify how to self-market, determine development areas, and position your attitude for a job search. **Sept. 23-24**

Family & Medical Leave Act (FMLA) for Supervisors: Topics include employee eligibility, MSF policy, use of benefits, pitfalls to avoid, and required documentation. Required training for supervisors. **Oct. 21**

FMLA for Employees: Increase your awareness of the benefits provided by this Act. **Oct. 21**

Quality Customer Service: Improve the skills and techniques necessary for effective public contact and first-class customer service. **Oct. 23-24**